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ABSTRACT

Reviewing research on grade retention, this paper describes tools and guidelines developed as an aid in retention decisions and examines actual promotion/retention policies and practices. Most research on academic and social effects of grade retention suffers from poor methodology, leaving the conclusions suspect and the results contradictory. The research designs are divided into three types; two are biased for or against retention, while the third type is the only effective design comparing the value of retention and promotion. Unfortunately, only three studies used this design type and all had additional problems. The review of research indicated that: (1) grade retention may be beneficial for a small number of students, but it does not seem to help most students; (2) the value of retention in improving academic achievement of low-achieving students depends on the criteria used; (3) retention does not harm self-concept; (4) repeating a school year is related to poor social adjustment and increased likelihood of dropping out; (5) retention does not appear to effectively motivate low-achieving students; and (6) primary grade students with good social/emotional adjustment who are low achievers benefit most from retention. Promotion/retention policies should be flexible and allow for individualized decisions. (MD)

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GRADE RETENTION:

RESEARCH, POLICIES, AND DECISION MAKING

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May 1984

TO: ACSA Representative Assembly

The Research, Evaluation, and Accreditation Committee has completed a number of studies this year. Documents representing the finished products of each of the subcommittees, as listed with their chairpersons, are included for your duplication and use. The subcommittee reports contained herein have been reviewed, edited, and approved by the full state committee.

Subcommittees:

Research: Joe Mrskos, Chairperson

"Grade Retention: Research, Policies, and Decision Making"
"Attracting and Maintaining a Quality Teaching Staff: A Synthesis of Research"
"A Research Paper on Time on Task and the Extended School Day/Year and Their Relationship to Improving Student Achievement
"Research and Special Studies Committee 1983-84 Activity Report"

Evaluation: Bob Coombs, Chairperson

"Microcomputer Selection Guidelines for Administrators"
"Project Micro Info"
"AB 507, The Bilingual Education Improvement and Reform Act"

Accreditation: Monroe Lair, Chairperson

"Liaison with Postsecondary Education Commission"
"Sponsorship of WASC Booth at ACSA Conference"
"Nomination of ACSA Members to the WASC Accrediting Commission for Schools"

Testing: Earl Owens, Chairperson

"Comprehensive Assessment Program Position Paper. The Proposed Change to a Comprehensive Assessment System"
"Testing Committee 1983-84 Activity Report"

The committee has also accomplished additional activities such as meetings with State Department of Education personnel, assistance in research, developing region committees, review of evaluation issues, and review of pertinent legislation. Through the subcommittee structure, committee members have been most productive in their contributions to the association.

Caroline DeOlden Chairperson
ACSA State Committee
Research, Evaluation, and Accreditation

HIGHLIGHTS OF THE RESEARCH ON GRADE RETENTION

A review of the research on grade retention indicates that it may be beneficial for a few students; however, retention does not seem to help the majority.

Academic Achievement: Most students improve their achievement during the repeated year when it is measured against grade norms. Most students fall behind when compared to similar students who were promoted. Gains tend to disappear in subsequent years.

Personal and Social Adjustment and Self Concept: Retention has been linked to low self concept, poor social adjustment, poor attitudes toward school, and potential for dropping out; however, a causal relationship has not been established. Self concept has been shown to improve during the repeated year; however, these improvements may disappear in the long run.

Maturity: Most students mature during the repeated year; those students who make the greatest gains were those who did not have a problem with maturity to begin with.

Motivation: The threat of retention does not provide motivation for low-achieving students; in fact, it may have the opposite effect.

Criteria for Retention: Students who show the most improvement are in the lower grades, especially first grade; have academic deficits that are not severe; and show good social/emotional adjustment.

Decision-Making Aids: All authors agree that each case should be considered on its individual merits. A variety of personal and environmental variables are offered as considerations in making retention decisions.

Policies and Practices: Most promotion/retention policies make allowances for individual differences. A few school systems base promotion solely on standardized achievement test scores.

The decision not to promote a student is a critical one; it could affect the rest of that student's academic career. It is imperative that such a decision be based on the best available research. This paper will review research that has been done on grade retention, describe tools and guidelines which have been developed to aid in making retention decisions, and examine actual promotion/retention policies and practices in an attempt to guide educators in making decisions and in developing policies. The research on retention will be examined in five areas: (1) academic achievement; (2) personal and social adjustment and self concept; (3) maturity; (4) motivation; and (5) characteristics of students who have had successful retention experiences. Most of the research is concerned with the elementary grades; therefore, that will be the focus of this paper. Emphasis will be on research that has been published since 1960; earlier studies have been thoroughly reviewed elsewhere.

Background

The practice of grade retention began in the mid-19th century when graded schools began to replace the one-room schoolhouse. Students were kept in the same grade until they had mastered the curriculum at that level. Grade retention based on academic criteria remained a common practice in American schools throughout the nineteenth century and the first part of the twentieth century. In the 1930's, however, research began to question its value. It was felt that the possible damage to the psycho-social development of students was not worth the small gains in intellectual development which grade retention might bring. Social promotion, the practice of promoting a student on the basis of age rather than academic achievement, became the accepted practice. Social promotion remained the standard until recently, when declines in academic achievement brought a demand for change in the schools. The movements for educational accountability and tighter academic standards brought with them a renewed interest in grade retention. Many educators and non-educators feel that it makes no sense to routinely promote a student who cannot perform at grade level.

The shifts during this century in educational philosophy on grade retention are reflected in retention rates. National figures on the number of students retained have never been published; however, figures from other sources point to a continuous decline throughout this century. Iowa, for example, went from a retention rate of 50 percent in 1900 to 25 percent in 1930 and 10 percent in 1950 (Walker, 1973). Rose, Medway, Cantrell, and Marus (1983) cite figures from the United States Census Bureau which show a sharp decline in enrollment below the mode (students enrolled in grades below what is normal for their age) between 1950 and 1960, a further decline between 1960 and 1970, and a slight decline between 1970 and 1976. Retention rates vary widely among states. A study of 16 states responding to a survey in 1970 showed averages ranging from 0.7 percent to 9.4 percent with the highest rates common in southern states and in the lower grades (Walker, 1973). A survey of the 1978-1980 retention rates in 13 states found averages ranging from 2.6 percent to 8.9 percent, again with the highest rates in the lower grades and especially first grade (Rose, Medway, Cantrell, and Marus, 1983).

It appears that the trend of declining retention rates may change in the near future, however. The movement towards competency based education has been accompanied by skyrocketing retention rates. After the Atlanta Public Schools implemented a competency based pupil progression plan, they saw their rate increase four-fold in one year (Rose, Medway, Cantrell, and Marus, 1983). Similar increases have been experienced elsewhere when promotion policies based on strict adherence to achievement test scores have been adopted. In Greensville County, Virginia, the pioneer of the strict competency based promotion policy, 23 percent of the students were retained during the first year (Owen and Ranick, 1977). Pinellas County, Florida witnessed an increase of 2-3 times their normal rate after instituting such a policy (Elligett and Tocco, 1983). When the District of Columbia Public Schools adopted a new student progress plan in which students were either promoted, retained, or half-promoted (placed in a transitional class), they found that 40.6 percent of their primary grade students were either retained or only half-promoted (District of Columbia Public Schools, 1981). Although these rates tend to drop in subsequent years, they remain significantly higher than their earlier levels. Clearly, such a trend has significant implications for retention rates in the United States.

Research

Much research has been done on the academic and social effects of grade retention. Unfortunately, most of this research suffers from poor methodology. The flaws in the research design of most of the studies make their conclusions suspect and the results often contradictory. Retention has been shown to be both helpful and harmful to academic progress and both helpful and harmful to a child's social adjustment and self concept. Whether a particular study finds retention to be beneficial or detrimental depends in large part upon the research design chosen for the study.

The research on grade retention has been reviewed many times over the last ten years. Thirteen research reviews published since 1973 were located. Significantly, not one of these reviews came out in favor of grade retention. The conclusions of the reviewers, who have examined the weight of evidence for and against retention, range from calls for more rigorous research to outright condemnations of the practice (Reiter, 1973; Walker, 1973; Jackson, 1975; Suarez, 1977; Bocks, 1977; Hess, 1978; Haddad, 1979; Thompson, 1980; Baenen, 1980; Bossing and Brien, 1980; ERIC Clearinghouse on Educational Management, 1981; Norton, 1983; Rose, Medway, Cantrell, and Marus, 1983). Representative conclusions of the reviewers include: "Taken as a whole, the experimental data collected over the past 70 years fail to indicate any significant benefits of grade retention for the majority of students with academic and adjustment problems" (Rose, Medway, Cantrell, and Marus, 1983); "The overwhelming majority of studies reveal that not only is this practice of no benefit to the child, but often it is harmful" (Bocks, 1977); "Consistently, forced repetition has failed to deal adequately with the problems of a large majority of slow-progress students" (Walker, 1973); and "Retention does not help achievement, and it seems to hurt student adjustment. It also does not help motivation. . . . All reviewers of the research prefer a policy of social promotion over a policy of retention" (Thompson, 1980).

The most respected review of retention research, if being quoted with

approval by other reviewers can be used as a criterion, is that which Jackson completed in 1975 for the United States Commission on Civil Rights. Jackson critically analyzed 44 studies dating from 1911 through 1973. From these studies, he identified three basic types of research design. Two of the three designs have inherent flaws which bias the results of the research either for or against retention. Design Type I compares the progress of students who are retained under normal school policies with the progress of students who are promoted under normal policies. Since it can be assumed that the retained students have academic or social/emotional problems that are not present in their promoted counterparts (otherwise they would not have been retained), it can be assumed that the promoted group will show more progress. This type of design is biased in favor of promotion.

Design Type II compares the condition of retained students before and after their year of retention. This design does not attempt to compare retention with promotion, but rather the effect of spending two years learning material intended to be learned in one year. It is reasonable to assume that students will show some progress after a second year in the same grade; therefore, this type of design is biased in favor of retention.

Design Type III is the only design which effectively compares the value of retention and promotion. Under this design, a group of students is identified for retention under normal school policies. Half of the group is then randomly chosen for promotion while the other half is retained. The short-term and long-term effects of grade retention can then be observed from comparisons of these two groups in the following year and in later years.

Unfortunately, Jackson found only three studies which used Design Type III and all of them had additional problems: the most recent of the studies was more than 30 years old; none of their samples were representative enough to permit broad generalizations; and they studied only short-term effects. An analysis of the findings of these studies did not significantly support or reject retention as an educational policy.

Jackson felt that conclusions could still be based on studies representing the first two design types if the findings went against the biases inherent in the designs. What he found, however, was what he anticipated: the studies from Design Type I significantly supported promotion while the studies from Design Type II significantly supported retention. The primary conclusion that Jackson arrived at was that additional controlled research is needed before any definite conclusions on the effectiveness of retention can be made. In the meantime, "educators who retain pupils in a grade do so without valid research evidence to indicate that such treatment will provide greater benefits to students with academic or adjustment difficulties than will promotion to the next grade" (Jackson, 1975).

Achievement

Chansky (1964) studied the effects of retention on academic achievement in the first grade. The population used was a group of students who were at risk for retention. Students from this group who were identified by their teachers and principals as more promising were promoted. The progress of the students who had been promoted was then compared with that of the

retained students. After a year, Chansky found significant differences on the vocabulary and reading scales of the California Achievement Test which favored the promoted students. However, the promoted students were still below the expectations of the next grade and again in danger of being retained.

This study provides a good example of the problems inherent in Jackson's Design Type I. Although all of the students involved were at risk for retention, those that were promoted had observable differences which led teachers and principals to believe that they had a better chance of succeeding in the second grade. The promoted students had higher mental ages and were months ahead in achievement areas before the study. It cannot be determined whether the superior performance of the promoted students was due to their promotion or to initial differences in ability.

Dobbs and Neville (1967) also studied the effects of retention on first graders. They attempted to overcome the problem of initial differences between the promoted and retained groups by matching 30 pairs of subjects on a variety of personal and academic variables. Each pair consisted of a student who had been retained and a student who had been promoted. Over a two-year period, they found significantly greater gains in reading and arithmetic achievement among the promoted group.

In 1971, Abidin, Golladay, and Howerton reported the results of a longitudinal study which observed the effects of retention over a six-year period. They compared students who had been retained in the first or second grade with students who had scored below the 25th percentile on the Metropolitan Readiness Test but who had been promoted. They found no short-term positive or negative effects of retention, but they did observe a significant long-term deterioration in the academic achievement and ability of the retained students relative to that of the promoted students. Their conclusion was that retention produces a continuous deterioration in achievement and intelligence throughout elementary school.

In an examination of the results of 25 studies, Rose, Medway, Cantrell, and Marus (1983) found that promoted pupils made gains averaging 8-12 months in one year while retained pupils gained approximately 6 months. In other words, they concluded, it often takes two years for the retained child to learn what the promoted child learned in one year.

Two studies compared the effects of high and low school retention rates on student performance. A survey which compared Philadelphia schools with low failure rates with similar schools with higher failure rates found that slightly more learning took place in the schools with low rates (School District of Philadelphia, 1965). Cook (1941) compared two school districts and found that the district with a high retention rate had significantly lower achievement in the upper grades than the one with a low retention rate. He also observed that schools with low retention rates had higher average achievement.

A doctoral dissertation by Powell (1982) assessed the academic effects of retention on elementary school pupils. He found that retention did not consistently improve achievement relative to national norms on standardized tests; however, the earlier the child was retained and the higher the child's pre-retention rank, the greater the improvement was likely to be.

Any gains in relative position in class for retainees were not likely to be sustained in the subsequent grade level.

Wright (1979) studied the impact of first grade retention on performance in the third grade. Retained and promoted groups were matched on several variables. Achievement test scores for the retained students showed a numerical advantage over the promoted students; however, this advantage disappeared when age was controlled. She concluded that the impact on achievement was not great enough to justify the use of grade retention for these students.

An evaluation of a retention/promotion policy for the Austin Independent School District which went into effect in 1981-1982 found that retainees made gains that were considered average for low achievers in reading and gains that were below average in math. Students with the lowest achievement in reading and math prior to retention made the greatest gains. The performance of retainees after repeating a grade was closer to that of their younger classmates than that of students with similar characteristics who had been promoted. Some students made impressive gains. The conclusion was that, if retention is intended to produce better gains among low achievers than routine promotion, it is not effective; however, if it is only expected that retainees will come closer to the functional level of their classmates, it succeeds to some extent. In either case, the fact that retention is not bad for all students suggests that retention decisions should be made very selectively and on an individual basis.

A study by Kerzner (1982) tested once-retained elementary students who had completed at least one grade level beyond the grade which had been repeated. Scores on the Comprehensive Test of Basic Skills were compared with scores prior to retention. Results showed that significant gains were made at all levels, but especially in grades 1-3.

Elligett and Tocco (1983) evaluated the new promotion/retention policy in Pinellas County, Florida. They compared the achievement test scores of retained students at three periods: (1) prior to retention, (2) immediately after retention, and (3) after completion of one more grade. They found that the median rank of retained students increased remarkably after their year of retention. The median rank then dropped when the students were promoted to the next grade; however, it still remained significantly above what it was prior to retention. Improvement in percentile ranking occurred at all levels, but was greater in the earlier grades than in the later grades. Elligett and Tocco emphasize that the scores from the year following promotion should be compared with the scores prior to retention since it is unlikely that students would have made such gains had they been routinely promoted. Thus, the new promotion/retention policy was effective in raising the achievement scores of retained pupils.

When examining the studies on retention, it is important to remember the problems in research design illuminated by Jackson. Regardless of the number of variables on which retained and promoted students are matched under Design Type I, there remain significant differences; otherwise, the retained student would not have been forced to repeat a grade. Regardless of the progress made by retainees in Design Type II, it cannot be determined how well they would have done had they been promoted. It is possible that they would have made greater progress. The research on the effects of

retention on achievement appear to warrant the following conclusions: (1) when academic achievement is measured against the norms for the grade which is being repeated, the retained student is likely to show improvement; (2) when the academic progress of the retained student is measured against the progress of promoted students who exhibit similar skills and abilities, the retainee is likely to fall behind; and (3) any gains that the retainee has made relative to new, younger classmates will tend to disappear in subsequent years. Thus, the effectiveness of grade retention in solving academic difficulties depends on the perspective one wishes to take; however, retention by itself apparently does not teach the child how to become a better student, so gains are not likely to be permanent.

Personal and Social Adjustment and Self Concept

The correlation between success or failure and self concept has been extensively researched. Walker (1973) cites numerous studies from the fields of education and psychology which demonstrate the cyclical relationship between self concept and failure (not necessarily grade retention). Failure breeds poor self concept which in turn leads to more failure. The issue at hand is the effect that failure caused by grade retention has on self concept. Is it more harmful to retain a student or to promote a student who will then remain at the bottom of the class? If a low-achieving student is socially promoted, there is no immediate sense of failure; however, the pattern of failure in relation to classmates remains unchanged. If the student is retained, the failure is there for all to see; but repeating a grade may help the student improve in class ranking, thus beginning a pattern of success. On the other hand, if a student experiences success for one year as a result of repeating a grade, what assurances are there that the success is not transitory? If the increase in achievement is not accompanied by an increase in ability to learn, then the student will soon be at the bottom of the class again, but this time with classmates who are younger. This could be an even more devastating blow to self concept.

In 1973, White and Howard reported a study which examined the self concepts of sixth grade students who had been retained once, more than once, or not at all. They found that the highest scores were obtained by the students who had never been retained. The scores of the students who had been retained once were significantly lower, and the scores of students who had been retained two or more times were significantly lower still. They concluded that failure to be promoted is related to the self concept of elementary school students. However, this study did not attempt to establish a causal relationship.

Finlayson (1977) questions the belief that retention fosters low self concept. In a two-year study of first grade students, he found that retention actually enhances self concept. Three groups were studied: nonpromoted students, promoted students, and borderline students (students who possessed similar characteristics to nonpromoted students, but who were promoted for one reason or another). At the beginning of the study, the promoted group had the highest self concept, followed by the borderline group, and then the nonpromoted group. During the first year, prior to promotion or nonpromotion, the promoted group and the borderline group experienced increases in self concept, while the nonpromoted group remained the same. After the second year, Finlayson found that the score of the

promoted group had decreased, the borderline group had decreased slightly, and the nonpromoted group had increased. At the end of the study, the borderline students had the highest self concepts and the promoted and nonpromoted students were virtually equal.

The Finlayson study raises some interesting questions. It can be assumed that the nonpromoted students met with success in their repeated year and so their self concepts improved. But why did the self concepts of the promoted students decrease? Is there something about the experience of second grade which is damaging to self concept? This does not seem to be the case since the borderline group decreased only slightly and came out of second grade with self concepts superior to the two other groups.

Some answers may be found in a study by Plummer (1982). The effects of retention on second- and fifth-grade students were observed. She found that retained students had significantly higher "actual" self concepts than promoted children. Actual self concept was based on the difference between real self concept and ideal self concept. Since previous failures in school had caused retained students to have significantly lower ideal standards, they did not set such high goals for themselves. Equal accomplishments for retained and promoted students result in greater increases in self concept for the retained students.

Bocks (1977) reports the conclusions of several older studies which examined the effects of retention on social adjustment and acceptance by classmates. They are unanimous in their conclusions that adjustment and acceptance are harmed by retention. As Bocks says, regardless of the name adults give to grade retention, "what the other children call it on the playground will not be changed." Among the findings are that regularly promoted students were significantly superior to retained students in their personal and social adjustment; that the retained child is likely to choose companions in the grades ahead and to view classmates as inappropriate companions; that retained students usually do not receive the social approval of their classmates; that promoted children are rejected significantly less by classmates; and that discrimination against overage children varied by grade level and was most severe in grades four, five, and six.

More recently, Plummer (1982) also found evidence of discrimination against retained students. In an experiment in which second- and fifth-grade students were asked to award prize chips to students, she found that retained students received less rewards even when their performance was equal to that of non-retained students.

Retention has also been linked to negative attitudes toward school and dropping out. Godfrey (1972) studied 1,200 students in grades six and seven to determine the differences between repeaters and nonrepeaters. She found that the repeaters had poor self concepts and that they tended to blame their failure on external forces over which they have no control.

A study reported by the School District of Philadelphia (1965) showed that very few boys dropped out of school unless they had repeated one or more grades. Ninety percent of the boys who had never been retained reached graduation, compared to only 25 percent of the boys who had been retained.

Haddad (1979), in a review of international research on grade retention,

cites several studies which link retention to dropping out. Among the findings are that a one percent increase in retention leads to an equivalent increase in the dropout rate and that retention at the primary level is a significant predictor of dropping out of high school.

Relationships have been demonstrated between students who have been retained and four indicators of personal and social well-being: low self concept, poor social adjustment, poor attitudes toward school, and potential for dropping out. The problem is trying to determine a cause and effect relationship. It has not been determined whether retainees fail because they have a low self concept or whether they have a low self concept because they fail. It has also not been determined that the reason retained students are rejected by other students or the reason that they drop out of school is because they were retained early in their academic career. It may be simply that the kinds of students who are at risk for retention are the same kinds of students who are at risk for dropping out. What is clear, however, is that retention does not solve the problems of poor self concept, poor social adjustment, poor attitudes toward school, or potential for dropping out. Although Finlayson's study provides evidence that retention may result in short-term improvements in self concept, the study by White and Howard suggests that these improvements may be short-lived.

Maturity

Immaturity is often used as a reason for retaining a student, especially in the primary grades. Immaturity may be chronological youngness or it may be that the student's behavior or developmental age is below his or her chronological age (Scott and Ames, 1969). A few studies have attempted to determine whether or not retention is beneficial for immature students. In 1968, Chase studied 65 students in the first, second, and third grades who were considered by their teachers to be immature but otherwise basically normal. Interviews were conducted with teachers and parents to assess the effects of a year's retention. Teachers felt that repeating a grade had met the needs of 75 percent of these students and that it had produced no emotional upset in 78 percent of them. Parents overwhelmingly felt that the retention experience had produced improved social and emotional adjustment in their children. Chase concluded that retention is beneficial for students when it is based primarily on immaturity.

Scott and Ames (1969) conducted a similar study in which 27 students, mostly from the primary grades, were selected for retention solely on the basis of immaturity. They, too, based their findings on interviews with teachers and parents. They found that retention appeared to have a beneficial effect on the student's grades and school behavior as reported by teachers, and on their school and home behavior as reported by parents. They concluded that, for students who are required to repeat a grade because of immaturity only, retention may be accompanied by no emotional or social difficulties and that it may result in improved grades.

Scott and Ames assert that the type of research found in their study and in the Chase study qualifies as rigorous research in contrast to the many studies which have concluded that retention can be harmful to a child's social and emotional well-being. However, their studies observed changes in children before and after repeating a grade and did not attempt to compare

them to a control group of either students who were promoted or students who were retained for reasons other than immaturity. Therefore, they were identified by Jackson (1975) as employing a Type II research design, one which is biased towards showing the benefits of retention. Furthermore, Rose, Medway, Cantrell, and Marus (1983) question the value of relying on the perceptions of teachers and parents as measures of the success of retention. The casual observer of the progress of retained children, they feel, is unable to compare whatever growth occurs with what might have occurred had the child been promoted.

Reinherz and Griffin (1970) studied primary grade boys of normal intelligence who had been retained. They did not attempt to limit their study to students who had been retained for a particular reason; however, they found that most of the first grade children had been retained for immaturity, while most of the second and third grade children were retained for academic reasons. Their results showed that a large proportion of children characterized as immature made satisfactory academic progress in the retained year when compared to children with less evidence of immaturity. They concluded that retention is most useful for normal but immature students in the early grades.

More recently, a somewhat different outcome was found by Sandoval and Hughes in their study of characteristics associated with successful first grade repeaters (1981). They found that students who exhibited emotional or social immaturity did not make as much progress in these areas as other children. The best predictors of improvement in emotional or social maturity were prior high scores on measures of maturity. Perceptual and physical maturity did not predict any outcomes and therefore did not appear to be important considerations in retaining a child. In other words, those students who benefited most from the chance to have a year to mature were those students who did not have a problem with maturity to begin with.

Not enough studies have been done on the benefits of retaining immature students to allow any real conclusions. It seems that parents and teachers are impressed with the growth they observe in immature children during the repeated year; however, the objectivity of their perceptions is doubtful. It is possible that these children would have exhibited growth whether or not they had been retained. Students who make the most gains in maturity appear to be those who are not retained because of immaturity. No research studies were found which compared the growth of students who were retained for immaturity with similar students who were not retained. It cannot be determined to what extent any growth in maturity was a result of being retained, and to what extent it was a result of growing another year older.

Motivation

Motivation has long been offered as a reason for maintaining a retention policy. If students believe that they are going to be promoted year after year and that they eventually will receive a high school diploma regardless of their academic skills or performance, then there is little motivation for them to work hard in school. If the threat of retention is present, then students will try harder in order to avoid being retained. Samuel Owen, the architect of the strict promotion/retention policy in Greensville County, Virginia echoes this belief, "If a child knows he will not be required to

achieve in order to be promoted, he frequently loses his motivation to try to learn and, besides falling behind himself, disrupts the classroom and hinders other students' learning" (Updating School Board Policies, 1977).

Only two research studies have dealt directly with this issue, and both of them are rather old. Otto and Melby (1935) studied the impact of the threat of failure on 352 students in second- and fifth-grade classes. The classes were divided into control and experimental classes for a one-semester study. The control group was informed throughout the semester that any student who did not do well would be retained. The experimental group was told that all students would be promoted regardless of performance. Otto and Melby found no significant differences in achievement gains between the two groups. Additionally, the teachers felt that the lack of threat of failure did not affect the work or attitudes of the experimental group. The conclusion was that the threat of retention is not a significant motivational force.

Kowitz and Armstrong (1961) also studied the threat of retention on student performance. They found that those students who were in no danger of being retained did increase their achievement levels; however, those students who were in danger of being retained actually performed worse. Thus, the threat of retention not only is not motivational to low achievers, it is actually harmful.

A possible explanation for this finding is provided by Godfrey (1972). She found that students who fail tend to blame it on external forces over which they have on control. If students feel they have no control over their possible retention, then the threat of it is not likely to be a motivating force. On the contrary, they may feel that there is no point in trying and they end up worse off than they were before.

Despite the fact that only two studies were found that directly examined the effects of retention on motivation, their similar findings allow the tentative conclusion that, at best, the threat of retention is not a valid motivational force and, at worst, it can actually cause poorer performance among those students it is intended to help.

Criteria for Retention

There is one result that is common to all of the research studies on grade retention, whether they support or reject retention as an educational policy: within each group, some students made significant gains, some made little or no progress, and some deteriorated in performance or adjustment (ERIC Clearinghouse on Educational Management, 1981).

Several studies have attempted to identify the common characteristics of successful repeaters in order to help educators make decisions regarding promotion or retention. Stringer (1960) analyzed 50 cases of retention in grades 1-8. She found that the most significant predictor of successful retention was the rate of academic progress in the year prior to retention. Successful retainees tended to have a progress rate that was less than half of normal. Another predictor was an achievement lag from one to two years below grade level. Students who were more than two years or less than one year below grade level tended to have achievement losses.

Reinherz and Griffin (1970) found that among male primary grade repeaters, successful retention was positively associated with emotional and social stability; immaturity; and a lower grade level, especially first grade.

An evaluation of the promotion/retention policy of the Austin Independent School District (1982) concluded that students do best in the repeated year when the source of their learning problems can be identified and a systematic plan can be developed to overcome those problems.

Plummer's examination of attitudes toward second- and fifth-grade repeaters (1982) discovered differences in their acceptance or rejection at these two levels. Second-graders were more accepting of repeaters in general, and especially of taller repeaters. Fifth-graders tended to attach more social stigma to retention and to prefer shorter repeaters. The fifth-graders focused more on social status while the second-graders focused more on height.

A major recent contribution to the research in this area is a study by Sandoval and Hughes (1981). They examined a wide range of characteristics associated with successful retention among first-grade students. Successful students had learned some academic material (especially reading), but not enough to enter second grade. They had good self concepts and adequate social skills. They had average vocabularies and intelligence. Their parents were involved in the school and had positive attitudes towards retention. Relatively unimportant factors were physical size, visual-motor development, family background, early life, and teacher philosophy. Characteristics associated with unsuccessful retention were extreme scores on measures of achievement and adjustment and social or emotional problems that teachers thought would improve. Sandoval and Hughes caution that retention should not be used as a substitute for special education. They conclude that retention can be a positive experience for a significant minority of children; however, children should be carefully selected for this intervention.

Retention appears to be most successful with students who possess some academic skills, but not enough to enable them to compete successfully in the next higher grade. Students who are severely deficient in academic skills do not benefit from retention; for these students, some form of special education may be preferable. Good social/emotional stability and adjustment enhances the student's chances for a successful retention experience. Retention seems to be the most beneficial in the lower grades, especially first grade.

Decision Making Aids

Several authors have developed recommendations, guidelines, or instruments to aid in making retention decisions in individual cases. Lindvig (1983) stresses that an attempt should be made to view the whole child, to trace his or her history in school, and to exhaust alternatives. Considerations for retention include a late birthdate, an unstable home environment, emotional as well as developmental immaturity, physiological factors, and specific learning disabilities. Serious consideration should be given to the age, maturity, and social adjustment of the child.

Rose, Medway, Cantrell, and Marus (1983) argue that retention decisions must be made on an individual basis by educators who are familiar with the research, practice, and theory in this area. On the basis of their review of the research, they conclude that one must first establish whether a child has a severe learning deficit in the basic skills and, if so, whether the curriculum material was taught and alternative instructional methods were tried. Contextual variables which should be considered include chronological age, social-emotional development, intellectual abilities, attendance patterns, family background, and attitudes of other family members. Finally, it must be determined how the child is to be recycled through the curriculum--it would be illogical to use the same methods that were inappropriate the first time.

A frequently-used instrument is Light's Retention Scale (Light, 1977). Light developed this scale to be used as an aid in discussing the pros and cons of whether a student should be retained. It measures 19 factors related to a student's ability, performance, adjustment, physiology, and environment. From two to five forced-choice responses are listed under each factor. A value of from zero to five has been assigned to each response indicating Light's opinion of the relative importance of that response in making a decision. A zero is considered to be a good indicator of successful retention, a five means that the child is not likely to benefit. After a response has been chosen for each factor, the sum total of the values is used to indicate whether or not the child is likely to benefit from retention. Light emphasizes that if a child has received a value of five on any individual factor, he or she should not be retained, regardless of the overall score. He also emphasizes that the scale is to be used as a guideline only and should not be considered a psychometric test. The following factors are included in Light's scale: sex of student, student's age, knowledge of English language, physical size, present grade placement, previous grade retentions, siblings, parents' school participation, experiential background, transiency, school attendance, estimate of intelligence, history of learning disabilities, present level of academic achievement, student's attitude about possible retention, motivation to complete school tasks, immature behavior, emotional problems, and history of delinquency.

Sandoval agrees that Light's Retention Scale should not be used a psychometric test. In fact, he questions whether it should be used at all. Sandoval conducted two studies to determine the reliability, concurrent validity, and predictive validity of Light's scale (Sandoval, 1980; Sandoval, 1982). The conclusion of the first study was that the scale is not reliable and that it has little concurrent validity. Individual factors may have utility as a counseling aid, but the total score must never be computed or used in decision making. The second study determined that the scale did not aid in the prediction of outcomes for children repeating the first grade. He concludes that the two studies together indicate that the psychometric use of Light's scale is totally untenable.

Lieberman (1980) has developed a decision-making model for retention decisions. He argues that to make a decision for retention on the basis of statistical evidence rather than on an in-depth analysis of all factors in each individual situation is foolhardy. He calls his model one of rational problem solving. Twenty-seven factors are divided into three categories: child factors, family factors, and school factors. Four responses are

possible for each factor: for retention, against retention, undecided, and not applicable. The factors are not weighted so that each situation may be analyzed on its own merits. Under each factor, the model describes the relative pros and cons in terms of retention. The following factors are included: child factors--physical disabilities, physical size, academic potential, psychosocial maturity, neurological maturity, child's self concept, child's ability to function independently, grade placement, chronological age, previous retentions, nature of the problem, sex, chronic absenteeism, basic skills competencies, peer pressure, and child's attitude toward retention; family factors--geographical moves, foreign language emigrants, attitude toward retention, age of siblings and sibling pressure, and involvement of family physician; and school factors--school system attitudes toward retention, principal's attitude toward retention, teacher attitude toward retention, availability of special education services, availability of other programmatic options, and availability of personnel.

All of the recommendations, guidelines, and instruments reviewed emphasize making retention decisions based on the unique factors present in each case. While the authors may differ on which criteria to use, all agree that the student should be viewed as an individual and not made to fit predetermined guidelines.

Considerations for retention which seem to be most often cited include: age; present grade level; attitudes of the student, parents, and others toward retention; intellectual ability; maturity; physical size; sex; family environment; social/emotional adjustment; current level of academic achievement; attendance; and previous retentions. The common thread among these criteria is that they are all related to the individual student's ability to benefit from retention; it is not automatically assumed that any student will be better off after spending an additional year in the same grade.

Policies and Practices

The promotion/retention policies and practices of local education agencies and schools range from non-specific guidelines which emphasize the desirability of social promotion to strict achievement-based criteria for promotion or retention.

Rose, Medway, Cantrell, and Marus (1983) surveyed 25 representative school districts in South Carolina. They found that the districts with written policies tended to have flexible standards which take into account individual variation. Most of the policies refered to one or more of the following factors: student's current achievement level; personal and home factors such as chronological age, social maturity, physical development, and parental attitudes; "the best interests of the student"; and the number of times the student has been retained.

Sixteen policies compiled by the Orange County (California) Department of Education in 1983 show an emphasis on making decisions based on the merits of individual cases. Commonly cited criteria are achievement, physical and emotional maturity, age, student's ability to deal with a retention, and parental approval.

A survey of policies and practices in 124 elementary schools in Ventura County, California, showed that the decision to retain a student was basically subjective and that the primary criterion was immaturity. Retention emphasized placing a student with a different teacher and providing him or her with individual work (Hubbell, 1980).

Young (1980) surveyed actual and ideal retention practices in Colorado elementary schools to determine the criteria, rationale, and procedures used. The following primary reasons for retention were found: parent and student support for retention, low academic functioning, social immaturity, young chronological age, small physical size, slow intellectual ability, placement in primary grades, frequent absences, deprived homelife, transiency, poor language skills, lack of effort, and the school's ability to serve students who deviate from the norm. Reasons against retention were: previous retentions, opposition by parents or the student, age-appropriate social skills, older chronological age, larger physical size, high intellectual ability, and good effort. Decisions for retention are to be made by teams which include students, parents, teachers, principals, other support personnel, and the superintendent in small districts.

Dade County, Florida, adopted a new pupil progression plan in 1976 (Dade County Public Schools, 1977). Promotion for each grade is based on meeting a minimum level of achievement in the basic skills. In addition, statewide standards must be met in the third, fifth, eighth, and eleventh grades. Except in unusual circumstances, students are to be retained only once in the primary grades, once in the intermediate grades, and once in the junior high grades. Although decisions are primarily based on academic achievement, consideration is also given to non-academic factors such as general progress, responsibility, attendance, mental and physical health, maturity, work habits, and attitudes.

Duval County, Florida, also adopted a pupil progression plan based primarily on test scores (Duval County Public Schools, 1979). Three criteria are used: minimum achievement test scores in math and reading, minimum skills test scores in math and reading, and teacher judgment of the student's ability to perform at the next higher grade level. Pupils who do not meet at least two of these three criteria are reassigned to the same grade level the following year or are entered into a special program. They are, however, given the opportunity to attend summer school in order to improve their achievement or skills test scores. If they satisfy the minimum requirements at the end of summer school, they are promoted to the next grade.

Probably the most famous and controversial achievement-based promotion policy is the program instituted in Greensville County, Virginia, in 1973. The Greensville program has been the subject of numerous articles in educational and popular journals and newspapers (Cates and Ash, 1983), and has been variously called a "commonsense approach" (Owen and Ranick, 1977), a "middle ground" (Cunningham and Owens, 1976), and a "dead-end road" (Koons, 1977). The Greensville program bases promotion entirely on standardized achievement test scores. If a student cannot perform at grade level, he or she is not promoted. Two innovations were incorporated into the Greensville program: (1) to avoid forcing students who had mastered some of the material to repeat the entire grade, half-step promotions are

used when possible; i.e., transitional grade levels are used; and (2) students who are retained are not put into a classroom with regularly promoted students but, instead, are put into classes composed entirely of retainees so that the curriculum can be altered to meet their needs.

Other school systems have instituted policies similar to the Greensville program. The District of Columbia adopted a rigid, competency-based Student Progress Plan (District of Columbia Public Schools, 1981). Students are given a standardized achievement test at the end of each semester. Those who have not mastered required skills in reading and mathematics are retained. Students who have mastered skills in one area and not the other are half-promoted to a transitional class. In the transitional class, they are essentially promoted to the next grade level in the subject they have mastered and retained in the same grade in the subject they have failed.

Pinellas County, Florida, put a promotion/retention policy into effect in 1977 that bases student promotion on a minimum standardized achievement test score (Elliggett and Tocco, 1983). The policy provides for administrative placement when other evidence indicates that the score is not reliable (either too high or too low). Different criteria are used for first-graders due to the unreliability of standardized test scores for very young children. The criterion for first grade is a specified profile level in a reading/language arts system or a specified reading level in a traditional basal reading program.

Owen and Ranick (1977) report significant increases in achievement test scores and I.Q. scores as a result of the Greensville program. Although a large proportion of students were retained in the first two years of the program (800 out of 3,750 students the first year; 1,100 the second year), the number has been falling since then (695 students were retained or half-promoted in the 1975-1976 school year). In that time, the overall achievement test scores of the district went from the bottom 20-30 percent based on national norms to the top 50-60 percent.

Koons (1977) cites a number of issues which question the reliability of the figures offered by Owens and Ranick. The first is the Hawthorne effect--when a school is performing poorly, any dramatic change in the program is likely to produce transitory increases in achievement. Second, the figures are reported for all students as a whole. The findings of Kowitz and Armstrong (1961), who demonstrated that the threat of retention causes good students to perform better and low achievers to perform more poorly, indicate that increases by able students may have obscured difficulties experienced by poor students. Third, students realized that test scores were the key to success and concentrated their energy on that. Finally, teachers also realized the importance of the tests and, consciously or unconsciously, taught to the test. Koons finds this very disturbing--test scores, Koons feels, should not be the goal of education.

A further explanation for the increases in standardized achievement test scores found in the Greensville program and similar programs is offered by McAfee (1981). Since national norms are based on grade level rather than on age, it is easy to raise scores by raising the age of the students who are taking the test. Students who repeat a grade have had one more year of experience, both in school and out of school, than the students on which the norms are based. Therefore, they are likely to perform better. If all that

a school system wishes to do is to raise the achievement test scores of its students, it can accomplish this simply by retaining a large proportion of those students.

In an analysis of the new promotion policy of the New Orleans Public Schools, Pechman (1982) questions the value of using standardized tests in making promotional decisions. In order to comply with state law, New Orleans implemented a policy in which test scores are used as the principal criterion in promotion decisions. Pechman argues that the tests only confirm what a teacher already knows--whether a student can read and do mathematics--and that the costs of such a system outweigh the benefits.

An example of a vastly different type of policy is that of the Eugene, Oregon school district (Thompson, 1980). This district believes that social promotion is the most desirable policy. Retention is considered only when there is reason to believe that it might best meet the student's needs, such as in cases of developmental immaturity or prolonged absences. Early retention is believed to be best. The final decision is made by the principal with the involvement of all interested parties; however, parents have the right to appeal the decision. The district opposes retention for purely academic reasons.

It is interesting to note at this point that the Greensville program is no longer in existence. It was ended in 1981 by an out-of-court settlement of a lawsuit which alleged that black students were being disproportionately represented in low-ability groups and disproportionately retained or half-promoted (Cates and Ash, 1983).

The type of promotion/retention policy that a school system adopts depends on the goals which it is trying to achieve. Currently, educators are feeling pressure from the public and from politicians to raise achievement test scores. If this becomes the primary goal of the school system, then adopting a promotion policy similar to the Greensville program is probably the best approach. This type of promotion policy has been effective in raising the standardized achievement test scores of its students. However, the school system needs to be prepared to retain between 20 and 40 percent of its students.

If the goal of the school system is to meet the needs of its low-achieving students, then a more moderate policy is called for. Most of the promotion/retention policies reviewed make allowances for individual differences among students. A variety of in-school and out-of-school factors are considered in retention decisions. The ability of the student to benefit from, and adjust to, retention is considered on an individual basis. It is not automatically assumed that any student who is having academic or adjustment difficulties will improve by spending another year in the same grade.

Conclusion

On the basis of the studies that have been examined, it appears that grade retention may be beneficial for a small number of students; however, it does not seem to help most students.

The value of retention in improving academic achievement of low-achieving students depends on the criteria that are used. Most students improve their academic achievement during the repeated year when achievement is measured by grade norms. Most students fall behind in their achievement when it is compared to the achievement of similar students who were promoted. Gains in academic standing within the repeated class tend to disappear in subsequent years. For most students, repeating a grade may have brought academic success, but that success is only temporary. Retention gives a student the opportunity to spend two years learning material that is intended to be learned in one year; but it does not teach the student how to improve his or her ability to learn.

Retention does not seem to harm self concept; in fact, in many cases it seems to improve it. The academic success associated with repeating a grade apparently translates into greater feelings of self-worth. Unfortunately, if it is the temporary academic success which causes the improvement, then it is likely that the improvement also will be temporary. Students who repeated grades in primary school still have lower self concepts years later than do students who were regularly promoted. Recent studies have demonstrated that retention may not be as harmful to self concept as once was thought; however, it does not appear to result in permanent improvements.

Repeating a year of school is also related to poor social adjustment, poor attitudes towards school, and increased likelihood of dropping out. Although a cause-and-effect relationship has not been established, it is apparent that grade retention does not solve these problems.

Interviews with teachers and parents of students retained for reasons of immaturity show that an extra year to grow is usually beneficial. Other research shows that a year to grow results in improved maturity for all students; in fact, mature students demonstrate greater gains in this area than do immature students. No studies have tried to ascertain whether an immature student would benefit more from retention or promotion. Too little research has been done on this topic to warrant definite conclusions; however, the benefits are not as overwhelming as Chase (1968) and Scott and Ames (1969) would like to believe.

Retention does not appear to be an effective motivator of low-achieving students. In some situations it may actually be harmful. However, even if it did provide a certain amount of motivation, there are better ways to get students to learn. Positive motivation is always preferable to threats.

Students who seem to benefit most from retention are primary-grade students, especially first-graders, who have good social/emotional adjustment and are a year or two below grade level in achievement. Students who are severely deficient in academic skills, or who exhibit serious social/emotional problems, may be better served by special education.

Retention decisions should be made on an individual basis. A wide variety of criteria related to the student's capabilities and environment need to be examined. Several decision-making aids are available to help educators consider whether or not the student is likely to benefit from repeating a grade. However, these aids should not be viewed as valid and reliable tests. They are intended only to assist in decision-making; they are not

designed to make the decisions themselves. When educators are in doubt about retaining or promoting a student, he or she should be promoted.

Promotion/retention policies need to be flexible enough to allow for individual decision-making. The policy should recognize that no set of criteria can account for all of the individual differences which must be considered in a retention decision. The optimum policy is one which sets forth broad, research-based guidelines; but which emphasizes that the decision is to be made by a committee which includes the student, the parents, and educators.

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